

Client A – No CM Indicated

1) Enter a UOS of "Case Management (non-medical)" > "Intake – No CM". In this example, we only entered 1 UOS, but you should enter the amount of time that appropriately reflects the amount of time spent with the client.

Service

Client **Client A**

Staff 1500003288

Date of Service * 8/23/2013

Contract Name * 12-13 Part B

Program Ryan White

Primary Service * Case Management (non-medical)

Secondary Service * Intake-No CM

Agency Subservice Intake-No CM

Units of Service 1 @ \$ 0.00 per 15 Minutes = \$ 0.00 **Total**

Client Payment CARE/HIPP Co-Payment

Actual Minutes Spent

Service Notes

Site 1

Days to Next Service date

Created Date

1) Select the right contract

2) Select "Ryan White"

3) Select "Case Management (non-medical)" as the "Primary Service"

4) Select "Intake-No CM" as the "Secondary Service"

☐ Finalize (record will be uneditable after changes are saved)

Save + Done **Save + Another ▶** **Cancel**

2) Enter a progress note summarizing the client session and explaining why the client does not have a need for case management.

Client A

Case Notes

StaffID

1500003288

Created

8/23/2013

Type

Assessment/Reassessment

Activity Date

8/23/2013

Category

Impressions

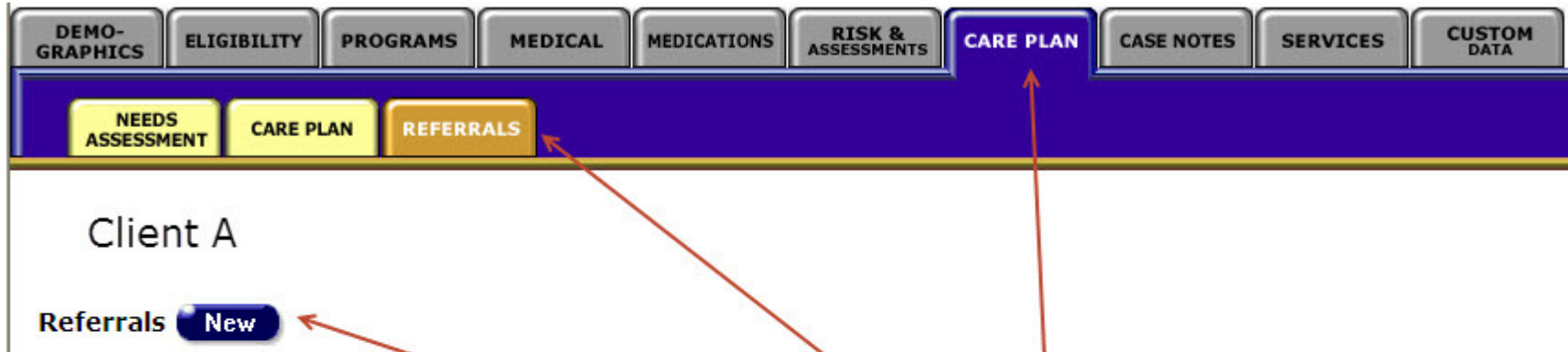
175 characters (max 7,750)

☐ Don't share

New Paragraph

This is where you summarize the session and explain why the client DOES NOT need case management, and what other assistance needs they client has

3) Find the referrals tab (under "Care Plan") in order to enter in the referral information












- 1) Click on "Care Plan" tab
- 2) Click on "Referrals" tab
- 3) Click on "New" to enter a new referral

Once you are in the referral screen, enter in the correct referral information including the expected target and follow-up dates

Client A

Referral

| | |
|--------------------------|--|
| Referral Date | <input type="text" value="8/23/2013"/>  |
| Program | <input type="text" value="Ryan White"/>  |
| Primary Service | <input type="text" value="Oral Health Care"/>  |
| Secondary Service | <input type="text" value="Routine Treatment"/>  |
| Refer To | <input type="text" value="Dental"/>  |
| (other) | <input type="text"/> |
| Target Date | <input type="text" value="8/28/2013"/>  |
| Follow-Up Date | <input type="text" value="8/29/2013"/>  |
| PSC Code | <input type="text"/> |
| Reason | <div><div></div><div> </div></div> |

You must enter in
the target date, and
the follow-up date

After you've saved the referral, it'll return you back to the main referral screen which will look like this:

NEEDS ASSESSMENT

CARE PLAN

REFERRALS

Client A

Referrals New

| Date | Service | Referred to | Target Date | Outcome |
|-----------|---|-------------|-------------|-------------------|
| 8/23/2013 | Ryan White > Oral Health Care > Routine Treatment | Dental | 8/28/2013 | Edit |

Finally, following the appointment, go back into the referral screen, click the "Edit" button under "Outcome" and enter in the outcome of the referral

Outcome Date

8/29/2013

Outcome


Kept appointment

Notes

This is where you'll enter in the outcome - your choices are: "Kept appointment", "No Show", "Rescheduled appointment"

4) Finally, enter a progress note explaining the referral made, and how Ryan White funds are being used as a payor of last resort.

Client A **Case Notes**

| | | | |
|----------------------|---|--|--|
| StaffID | <input type="text" value="1500003288"/> | Created | <input type="text" value="8/23/2013"/> |
| Type | <input type="text" value="Progress Note"/> | Activity Date | <input type="text" value="8/23/2013"/>  |
| <div></div> | | | |
| Category | <input type="text" value="Medical"/> | 130 characters (max 7,750) <input type="checkbox"/> Don't share | |
| New Paragraph | <div>This is where you explain why you're making the referral, why the client needs assistance, and how Ryan White funds are being used as a payor of last resort</div> | | |

Client B – CM Indicated

1) Enter a UOS of "Case Management (non-medical)" > "Intake – CM". In this example we only entered 1 UOS, but you should enter the amount of time that appropriately reflects the amount of time spent with the client.

Service

| | | | |
|---|-------------------------------|------------------------------------|--------------|
| Client | Client B | | |
| Staff | 1500003288 | | |
| Date of Service * | 8/20/2013 | | |
| Contract Name * | 12-13 Part B | | |
| Program | Ryan White | | |
| Primary Service * | Case Management (non-medical) | | |
| Secondary Service * | Intake-CM | | |
| Agency Subservice | Intake-CM | | |
| Units of Service | 1 | @ \$ 0.00 per 15 Minutes = \$ 0.00 | Total |
| Client Payment | | CARE/HIPP Co-Payment | |
| Actual Minutes Spent | | | |
| Service Notes | | | |
| <input type="checkbox"/> Finalize (record will be uneditable after changes are saved) | | | |

1) Select the right contract

2) Select "Ryan White"

3) Select "Case Management (non-medical)" as the "Primary Service"

4) Select "Intake - CM" as the "Secondary Service"

2) Enter a progress note summarizing the client session and explaining why the client has a need for case management.

Client B

Case Notes

StaffID 1500003288

Created 8/22/2013

Type Assessment/Reassessment

Activity Date 8/22/2013



Category Impressions 110 characters (max 7,750)

☐ Don't share

New Paragraph

This is where you summarize the session and explain why the client has a need for case management

3) After completing part of the assessment, you enter in the appropriate UOS of CM for the session.

Service

| | | | |
|---|-------------------------------|-----------|----------------------------------|
| Client | Client B | | |
| Staff | 1500003288 | | Site 1 |
| Date of Service * | 8/20/2013 | | Days to Next Service date |
| Contract Name * | 12-13 Part B | | Created Date |
| Program | Ryan White | | |
| Primary Service * | Case Management (non-medical) | | |
| Secondary Service * | Case Management (non-medical) | | |
| Agency Subservice | Case Management (non-medical) | | |
| Units of Service | 4 @ \$ 0.00 per 15 Minutes | = \$ 0.00 | Total |
| Client Payment | CARE/HIPP Co-Payment | | |
| Actual Minutes Spent | | | |
| Service Notes | | | |
| <input type="checkbox"/> Finalize (record will be uneditable after changes are saved) | | | |
| <div>Save + Done Save + Another ► Cancel</div> | | | |

4) Since you were able to complete the SAMISS during the session, you also enter that information under the risks and assessments tab.

DEMO-GRAPHICS

ELIGIBILITY

PROGRAMS

MEDICAL

MEDICATIONS

RISK & ASSESSMENTS

CARE PLAN

CASE NOTES

SERVICES

CUSTOM DATA

RISK FACTORS

SUBSTANCE ABUSE

MENTAL HEALTH

ASSESSMENTS

ASSESSMENT

Client B

Psychosocial Factors

Edit

Functional Status

Date

Staff

New

Behavioral Risk

Date

Staff

New

Barriers to Care

Date

Staff

New

Substance Abuse and Mental Illness Symptoms Screener (SAMISS)

Date

Staff

Refer to Substance Abuse Treatment

Refer to Mental Health Counseling

New

Enter SAMISS results here